

**Utah Working Interdisciplinary Network of Guardianship Stakeholders (WINGS)**

Thursday, August 18, 2022 - 12:00 to 2:00 p.m.

Attended			Not Present	
Judge Keith Kelly	TantaLisa Clayton	Andrew Riggle	Judge David Connors	Nels Holmgren
Judge James Brady	Xia Erickson	Keri Sargent	Shane Bahr	Nan Mendenhall
Sarah Box	Wendy Fayles	Shonna Thomas	Katie Cox	Danaka Robles
Deborah Brown	Eve Larsen	Katie Thomson	Rob Denton	Holly Thorson
Brant Christiansen	Alan Ormsby	James Toledo	Rob Ence	Todd Weiler
			Leslie Francis	Michelle Wilkes
				Kaye Lynn Wootton

Agenda			
Topic	Presenter	Materials	
<b>12:00 Meeting begins</b>			
<ul style="list-style-type: none"> <li>Housekeeping – welcome, minutes</li> </ul>	Judge Kelly	<ul style="list-style-type: none"> <li><i>WINGS Minutes (June 2022 – draft)</i></li> </ul>	
<b>12:10 Stakeholder Updates</b>			
<ul style="list-style-type: none"> <li>GRAMP</li> <li>Probate subcommittee update</li> <li>Other                             <ul style="list-style-type: none"> <li>Replacement for Dr. Miranda</li> </ul> </li> </ul>	Stakeholders		
<b>12:45 Ongoing Projects</b>			
<ul style="list-style-type: none"> <li>New/amended guardianship forms</li> </ul>	Group Discussion	<ol style="list-style-type: none"> <li><i>Motion to Review a Guardianship or Conservatorship of an Adult (WINGS draft)</i></li> <li><i>Motion to Review a Guardianship or Conservatorship of a Minor (WINGS draft)</i></li> <li><i>Motion to Terminate a Guardianship or Conservatorship of an Adult (WINGS draft)</i></li> <li><i>Motion to Terminate a Guardianship or Conservatorship of a Minor (WINGS draft)</i></li> <li><i>Motion to Change Accounting Report Requirements (WINGS draft)</i></li> <li><i>Financial Accounting Report (WINGS draft)</i></li> <li><i>Financial Accounting – Instructions (WINGS draft)</i></li> </ol>	
<ul style="list-style-type: none"> <li>Utah Code 75-5-303</li> </ul>	Group Discussion	<ul style="list-style-type: none"> <li><i>Utah Code 75-5-303 (to discuss)</i></li> </ul>	
<b>1:45 Other Business</b>			
<ul style="list-style-type: none"> <li>Guardianship for school purposes</li> </ul>	Shonna Thomas		
<b>2:00 Meeting adjourned</b>			

## Housekeeping

- Meeting began at 12:02pm.
- A motion was made to approve the minutes from the previous meeting (June 2022). The motion was seconded and approved.
- New member, Eve Larsen, was introduced. Eve is a case manager with Davis County Senior Services. She previously worked with Guardian and Conservator Services.
- Meeting adjourned at 2:00pm.

## Stakeholder Updates

### GRAMP

- Court Visitor Program recruitment –
  - The Court Visitor Program had been severely hampered in recruitment efforts, due to lack of resources and the pandemic.
  - Since the addition of a second Court Visitor Program Coordinator, the Court Visitor Program has been able to put resources toward recruiting new Court Visitors. These efforts have been successful, and the program has added 5 new Court Visitor volunteers over the summer.
  - Recruitment efforts will continue, including possible partnerships with the universities to produce a rotating group of student volunteers to handle simple cases.

### Probate subcommittee

- Rule 6-501 –
  - The public comment period ended, and the rule went for final review by the Policy and Planning committee.
  - The committee reviewed the few comments received and the recommendation from the Clerks of Court to reclassify the coversheet as an Order.
  - The Judicial Council will give final approval before the rule change goes into effect.

#### Discussion

- Clarifying the requirement for a judicial review of annual reports will be helpful for several districts.
- This will be a particularly big change for third district and will require additional effort to ensure the judges and support staff are ready when rule changes are enacted.
- Additional training for judges will be helpful in educating judges on the rule and implementing these changes.
- Katie Thomson has been working with Judge Laura Scott to develop a checklist that could be used to assist judges in the review process. Additional input is welcome.
- WINGS started putting together checklists for the annual reports two years ago. They were never completed, but they could be modified or updated to serve in this capacity.

#### Decisions Made

- Shonna will follow up with Meredith Mannebach on WINGS conducting a Brown Bag training for judges in October or November.

- Katie will email the checklist document to Shonna and Judge Kelly. They will review the checklist and provide feedback.
- Shonna will send to stakeholders the sample checklists WINGS put together two years ago.
- Rule 6-507 –
  - No updates at this time.

#### Other

- Replacement for Dr. Miranda
  - Dr. Miranda is a clinical neuropsychologist, and she has been a WINGS stakeholder for nearly three years. She has moved out of state and will no longer be part of the WINGS committee.
  - Having a medical perspective and viewpoint on WINGS projects has been helpful. WINGS would benefit from finding another stakeholder with a similar background and expertise as Dr. Miranda.

#### Decisions Made

- Brant Christensen will reach out to individuals who might be able to fill this spot. If one of them expresses interest, Brant will share this at the next Executive Committee meeting.
- If any WINGS stakeholders know of an individual with a medical background interested in aging issues, reach out to see if they would be interested in joining WINGS. The Executive Committee can review any nominees at the next meeting.

### Ongoing Projects

#### **New/amended guardianship forms**

Based on the discussion and feedback from the last meeting, the draft forms have been revised and are ready for additional review.

#### Discussion

##### Draft 1. Motion to Review a Guardianship or Conservatorship of an Adult

- On #3, there was discussion about the merits of adding a line for requesting a co-guardian or co-conservator. (Instructions to be added to the webpage to direct to the other required forms, testing, etc.) The Self-Help Center gets this question often and they have had to provide forms outside of court-approved templates to assist patrons with requesting this change.
- It was also recommended that the form title change to better reflect its dual purpose - “Motion to Review and/or Alter a Guardianship of Conservatorship of an Adult” and to add a place on the front of the form to request a hearing.

##### Draft 2. Motion to Review a Guardianship or Conservatorship of a Minor

- A minor is generally not referred to as a Protected Person in court documents. Recommend changing language in the form from protected person to minor. It was also recommended that Parent be added as an option to the header and on #1.
- On #7 – the group discussed the requirements and options for legal representation of minors, including a Guardian ad Litem (GAL) and Private Guardian ad Litem (PGAL).

**Draft 3. Motion to Terminate a Guardianship or Conservatorship of an Adult**

- There was discussion on whether the first and second options on #3 were redundant and could lead to confusion for judicial staff (modification versus termination).
- The group also discussed adding supporting documentation, include medical records on #5, the best way to handle the statutory requirements for an attorney on #7, and the best way to handle the options listed on #8.

**Draft 4. Motion to Terminate a Guardianship or Conservatorship of a Minor**

- This form has the same recommendations as Draft 2 – including adding the option for parent and changing the language from protected person to minor.
- There was also some discussion on altering the language under #7 to include the estate going to the minor’s parent.

**Draft 5. Motion to Change Accounting Report Requirements**

- A decision was made to add in a section to list the current reporting requirements, prior to requesting a change in those reporting requirements.
- The group discussed the rules surrounding reporting frequency and what the judge is required to do or has the discretion to do per Utah Code.
- The Self-Help Center webpage could include language about the filing fees and a link to the fee waiver form (rather than including it on the form itself).

**Draft 6. Financial Accounting**

- Question asked - Can lines be added to the tables, to include more categories?  
 Answer – Yes. Forms are provided as PDF, Word, and electronic via OCAP, to account for different ability levels and resources. The Word version would allow the filer to modify by adding rows to tables.

**Decisions Made**

- Sarah Box will send to Shonna an example form showing a hearing request checkbox and other recommended language.
- Keri Sargent and Shonna will reach out to the GAL’s office and share with WINGS information on GAL / PGAL referrals and their involvement in guardianship cases outside of the juvenile court.
- Shonna will make updates to the forms based on the discussion during the meeting and send the drafts to stakeholders for final review.

**Utah Code 75-5-303**

- Due to time constraints, discussion on this topic is deferred to the October meeting.

**Other Business**

- NA. Deferred to the October meeting.

<b>Action Items</b>	
<b>Rule 6-501</b> <ul style="list-style-type: none"> <li>– Follow up with Meredith Mannebach on WINGS conducting a Brown Bag training for judges in October or November. Determine who is allowed to attend and/or whether it will be recorded.</li> </ul>	Shonna Thomas
<ul style="list-style-type: none"> <li>– Review the 3<sup>rd</sup> district checklist and provide feedback.</li> </ul>	Judge Kelly Katie Thomson Shonna Thomas
<ul style="list-style-type: none"> <li>– Send to stakeholders the sample checklists WINGS put together two years ago.</li> </ul>	Shonna Thomas
<b>Replacement for Dr. Miranda</b> <ul style="list-style-type: none"> <li>– Reach out to individuals with a medical background interested in aging issues who might be able to fill this spot. If one of them expresses interest, share with Shonna the names of any nominees.</li> </ul>	Brant Christensen WINGS Stakeholders
<b>New/amended guardianship forms</b> <ul style="list-style-type: none"> <li>– Send to Shonna an example form showing a hearing request checkbox and other recommended language.</li> </ul>	Sarah Box
<ul style="list-style-type: none"> <li>– Reach out to the GAL’s office and share with WINGS information on GAL / PGAL referrals and their involvement in guardianship cases outside of the juvenile court.</li> </ul>	Keri Sargent Shonna Thomas
<ul style="list-style-type: none"> <li>– Update the forms based the discussion and send the drafts to stakeholders for final review.</li> </ul>	Shonna Thomas
<ul style="list-style-type: none"> <li>– Review the updated draft forms and provide feedback if needed.</li> </ul>	WINGS Stakeholders

<b>Deferred / Continuing Items</b>
<ul style="list-style-type: none"> <li>– Project Updates <ul style="list-style-type: none"> <li>○ Rule 6-501 &amp; Rule 6-507</li> <li>○ Form updates</li> </ul> </li> <li>– Utah Code 75-5-303</li> <li>– Informal vs. formal accounting forms</li> <li>– GSP “Sandbox” project</li> <li>– Guardianship for school purposes</li> </ul>

<b>Next Meeting(s):</b>	October 20, 2022 December 15, 2022 February 16, 2023 April 20, 2023 June 15, 2023
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